

## **General Guidelines on Sole Source Requests for Agency Contracts**

Sole Source Procurements that are greater than \$1,000 must be pre-approved by the Division of Purchasing. The Agency shall complete the Sole Source Request Form, and email the completed form, along with the quotation from the supplier to [purchasingsolesource@utah.gov](mailto:purchasingsolesource@utah.gov).

When a Sole Source Request is for an Agency Contract, the request should include the following:

1. The total number of years for the initial contract and the number of years for renewal options must be stated. If there is not a request for renewal options, then the contract would be allowed for only one year. The total number of years including the renewal period should not exceed five. Enter the renewal options in the Agency Contract box under Action #2.
2. Per statement in Action#3, a quote from the supplier must be included with the sole source request. Sole sources that arrive at State Purchasing without a quote will be returned to the sender.
3. The total costs for the contract must include all renewal periods. The amount that is listed on the Sole Source Request is the maximum amount that the Division of Purchasing will allow for the full contract term, including renewals. Requests to increase the contract over the costs listed in the Sole Source will require a new Sole Source to be processed.
4. The agency can add additional information about the costs, such as the annual cost, in the costs section.
5. The request needs to include complete and accurate information regarding why the purchase is a sole source, including contacts made with other vendors, research done, etc.
6. If the purchase is for Information Technology (IT) products, then the Department of Technology Services has to approve the Sole Source Request before it is sent to State Purchasing. The Department of Technology Services will forward the sole source request along with the required Business Case to State Purchasing. Technology sole source requests that arrive directly from the agency will be returned to the sender.

Sole Source Requests that exceed \$50,000 for the full contract term are posted for five business days on the Division of Purchasing bidding system, BidSync, so that vendors have an opportunity to dispute the sole source status of the purchase. All comments from vendors are considered carefully before a Sole Source is approved. If a sole source is above \$50,000, Purchasing requires that a WORD document version of the request be sent to them so that agents can copy and paste information into BidSync.

Following these guidelines will result in more accurate Sole Source Requests that meet the agency needs for the full term of a requested contract.